Goods Order Inventory System

Standalone

User Manual

Android Version 1.1.1
iPhone Version 1.7

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Introduction

Goods Order Inventory System is an inventory management system where an individual, small or medium scale industry user can manage their Categories, Products, Orders, Inventory and Sales, etc. on a mobile platform. The standalone version is lunched as a free product in App store, Android Play Store and also at www.goodsorderinventory.com website. Commonly we are referring this product as "GOIS Standalone" as it is running independently across mobile devices.

The current standalone version supports in following devices.

1. iPhone, iPad
2. Android, Android Tab
3. BlackBerry

System Requirements

- iPhone, iPad
  - iPhone 2.0 and above
- Android, Android Tab
  - Android 2.0 or above

Getting Started

To use GOIS Standalone app, first the user has to download and install it in on the mobile device. User can download this app from android play store or from apple's app-store as per the mobile device.

Visit www.goodsorderinventory.com for getting more information about this app and download instruction.

After installing the app, user will see the below icon on their screen.

GOIS Icon

Click on the GOIS icon to start the app. This will display the splash screen.

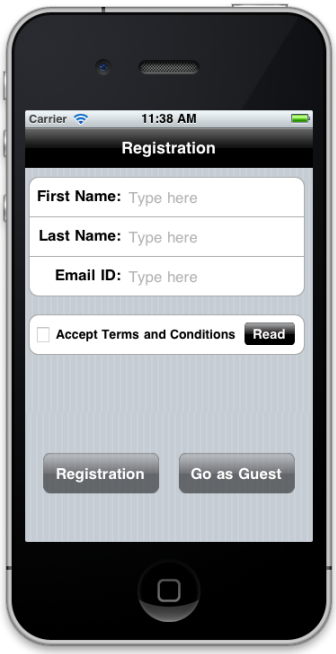
Splash Screen

Splash is the first screen of GOIS app. It contains the GOIS app logo, current application version number and copyrights information. This screen will disappear after few seconds. After splash screen, user will get the registration screen.

GOIS Splash Screen

User Registration

Before the user can use the GOIS application, registration is required. Users can register by providing their first name, last name and email. After checking the Terms and Conditions, user can click on the Registration button. On clicking the Registration button, Settings screen is displayed.



Go as Guest

This option is available for users who wish to use the application without registering. A temporary account is created for such users. A guest user can modify his account information for future communication or to take the advantage of import database by updating a proper email ID in "More" > "User Profile" screen.

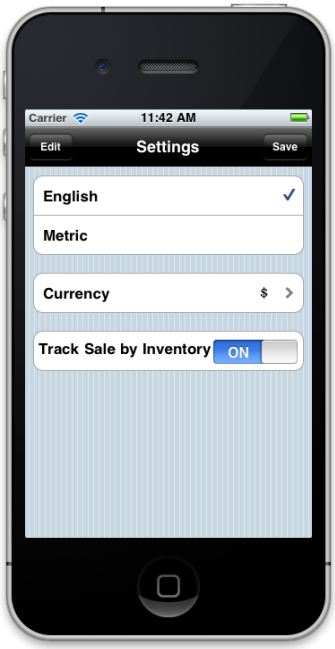
Note: The Import Database & Import Products features are not available until the Guest user updates their Email ID.

User Profile

In user profile, the user can update profile information like user's name, email id etc. This will help us for tracking the issues, feedback or any future communication.

Settings

After 'Registration' user will get the 'Settings' by default. User can also change the settings latter from "More" > "Settings" menu.



Unit

Units are used to define the quantity of the product.

Note: *Currently we don't support breakup of the units like 10Kg 500gm, user has to maintain it like 10.5 Kg.*

Unit Type

In 'Setting', user has the option to set the default unit type. Based on the unit type, units are available while adding products. In GOIS, units are categorized in two types:

1. **English**
   It contains unit like inch, foot, gallon, mile & pound, etc.
2. **Metric**
   It contains unit like meter, kilogram & liter, etc.

System Defined Unit

In each unit type, some predefined units are available which are referred as "System Defined" units. The symbol "S" stands for "System Defined" units.

User Defined Unit

Other than the "System Defined" units, user has the option of adding new units as per the requirement. The symbol "U" stands for the "User Defined" units.

The units which are added by user are listed into the unit type selected by the user in 'Setting'.

Adding New Unit

In "More" section, click on the "Settings" menu. This will show the "Setting" screen. On that screen, click on the "Edit" button available on top left corner. User will get the "Add Unit" screen. In that screen user can add and save new unit as per the requirement.

Note: *In android when saving new unit, it asks for whether to support the decimal values or not. If user chooses "No" then that unit will not support the decimal values when adding quantity for product. This feature is not available in iPhone.*

Edit/Delete Unit

System defined units could not be edited/deleted. However, user can edit the user defined units. If the user edits the user defined unit, then the change will be reflected throughout the system. If a user defined unit is in use anywhere when defining the product, then it cannot be deleted. To delete that unit, it should be removed from all the references, where it is used.

Currency

For defining the price of any product, currency is required. GOIS Standalone supports 82 different currencies. In "Setting" section there is this facility to select the currency from the available 'currency list'. The selected currency will be displayed all over the system for the monetary data. User is free to change the currency at any time from settings screen and that changes will reflect all over the system.

Sale Tracking (On/Off)

Sale can be done in two ways:

1. **From Product List (Sale Tracking Off)**
   When sale is done using product list after creating the sales record, inventory quantity is not affected. In this case, the profit/loss is calculated based on the purchase price and sales price set for the product.

2. **From Inventory List (Sale Tracking On)**
   When sale is done from inventory list then user has the option to choose the products for sale from the list of inventory for each product, i.e. user has the same product with multiple stock and different purchase & sale price for each of them, from which the user may choose. Thus, sale entry cannot be more than the individual stock item for that product. This option provides the facility to get the exact profit/loss information for each inventory entry against a product.

In "Setting" section, user can set the Sale Tracking "On" or "Off". Therefore, if Sale Tracking is "Off" then user will get the product list and if "On" then user will get the inventory list while adding the sales order.

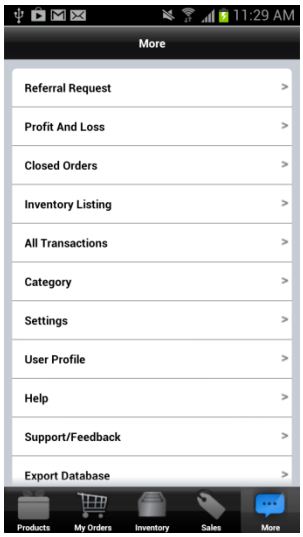
Using the System

Menu Items

The following items are present in the main menu of GOIS Standalone application:

- Products
- My Orders
- Inventory
- Sales
- More

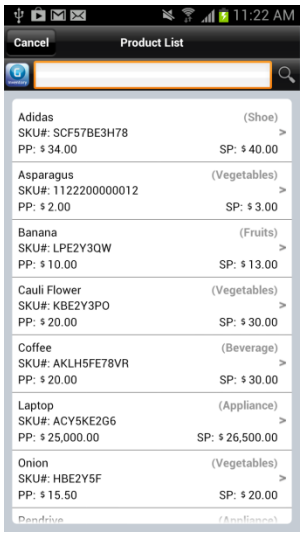
All these items have been explained in the below sections.



Product

In product tab, user can manage the product's information like view active product list, add/edit the selected product, filter and sort the product.

Just after installing the GOIS application user will get two default products for demo purpose. These products can be edited / deleted.



Adding New Products

New products can be added into the GOIS app in two ways:

1. Using the Add(+) icon
2. Using Import Product

Using the Add (+) icon

Click on the '+' icon present at the top right corner of the "Products" screen. This will open up the "Add Product" screen. In "Add Product" screen user needs to select a category for product, put product's name, description, unit purchase price, unit sale price, unit and the product number (SKU Number). Then click on the "Save" button to save the product.

Note:

1. *SKU# is treated as unique no for defining a product in GOIS-Standalone.*
2. *User can put the SKU# manually or can scan the product barcode for populating the SKU#.*

Scan Button

Click on the "Scan" button which is present at the bottom of the "Add Product" screen. This will activate the device's camera. To scan the barcode information of the product, product's barcode should be held close to the camera, so that it can be easily read. The device will capture the barcode number and populate that number in the SKU# field of the "Add Product" screen.

Import Products from a CSV File

The Import Product feature provides user the facility to create a list of Products in GOIS app in one go without the need of adding them one by one. Like the Import Database feature, user will get a similar interface for importing the product list from a CSV file.

User can download the sample CSV file format using link:

http://www.goodsorderinventory.com/SampleFiles/Product.csv

Goods order Inventory system treats a Product's uniqueness by its SKU Number. So, when user imports 'Products' from a properly formatted CSV file, then it will create new products based on the new SKU numbers which are not present in user's existing Products list. During import process, if user selects the option Update existing data, then the Products with existing SKU numbers will get updated with new data from the imported CSV file.

Updating Product

Once products have been added, they can be updated from the 'Products' screen by. User can select the product to be edited; this will show the "Edit Product" screen by populating the saved product data. Now user can update product's category, name, SKU#, description, unit purchase price, unit sale price & product's unit. After putting the updated information, user should make sure to click on the "Update" button present at the bottom of the "Edit Product" screen.

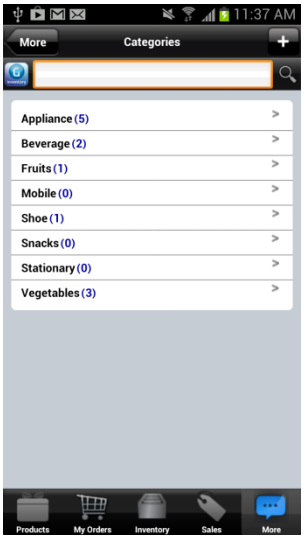
Delete Product

From the beginning of the application, user has the option of deleting a product which was not used in order, inventory or sales section. However, in GOIS-Standalone for iPhone version 1.7 and Android version 1.1.0, there is also a facility to delete the products which are already used in order, inventory or sales section. In that case, system requires confirmation. If user decides to choose "Yes" then it will delete that product and all its reference from the system. After deletion the data cannot be reverted back. Therefore, user should make sure to take the backup before doing any 'delete' or 'update'.

To delete a product, select the product from "Product" screen. This will show the "Edit Product" screen. In that screen user has the button "Delete". By clicking on that delete button, user can delete the selected product.

Product Category

The Product Categories are be used to group the products in certain category. By placing products into categories, the user can easily search and browse products. Categories are managed in "More" > "Categories" menu. In "Categories" screen, user can also view the products



Adding a Category

Product categories can be added from 'More' > 'Category' Menu. Click on the "+" button to add a new category. User needs to enter the category name and then has to click on the 'Save' button.

Note: *Two categories should not have the same name, i.e. each category must be assigned a unique name.*

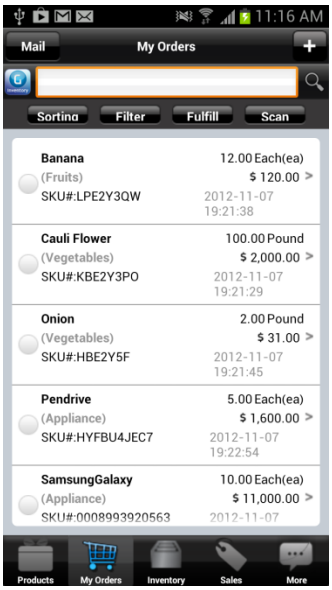
Editing a Category

Category name can be edited from the 'More' screen. If user will edit a category name which is used in product, Order, Inventory or Sale section, then the new name will be reflected throughout the system.

Delete Category

Categories which contain products cannot be deleted from system. To delete that category, user has to remove the category reference from products. User can view the count (no of products) attached to the category in Category List.

Purchase Order



In Purchase Order section a business user can manage the ordered items for the vendors. GOIS standalone doesn't support vendor integration, but this supports order creation for each product, email order list and fulfill order when order is received from a vendor. The user can also view closed orders which are already added into the inventory.

My Orders

All the active and not fulfilled purchase orders are displayed in My Orders section. In this section, user has the option to create a new order, email the new orders by filtering and sorting the order items and can fulfill the orders and create inventory after receiving it from vendor.

Adding New Purchase Order

An order can be added in two ways

- Using the 'Scan' button in My Orders section
- By clicking the + icon present at the top right corner of the screen

Adding Order by Scan button

By clicking the scan button, user can scan the barcode of the product. If a product already exists in the product list then it will populate the details of the scanned product in 'Add Order' section. If the product doesn't exist, then it will show the add product screen with barcode in SKU#. After adding that new product, user can create purchase order record for that product.

Adding Order by + button

After clicking on the + icon 'Add New Order' screen will open up. User has to enter Unit Purchase Price, Unit Sale Price, and Quantity for the selected product. The total purchase price for a product will be calculated automatically. This is an expected purchase price before Order to Vendor. The real purchase price and sales price can be updated when fulfilling the product into the inventory. Once the user clicks on "Add" or "Save" button, the new order will be added in to the order list.

Edit Purchase Order

A purchase order can also be edited as long as it has not been fulfilled. To edit an order, user needs to select the 'My Orders' tab. This will open up a list of all the Purchase Orders. Then the purchase order which needs editing should be selected from the list. User can edit ordered product's details like unit purchase price, unit sale price & quantity. After updating, user has to click "Update" button to save the changes.

Delete Purchase Order

User can select the order from “My Orders” section. This will show the “Edit Order” screen. In that screen, there is a “Delete” button present at the bottom of the screen. By clicking on that button, user will get a delete confirmation message. After choosing “Yes” the order will get deleted from “My Orders” list.

Fulfilling Purchase Order

When a purchase order is received from vendor then that order can be fulfilled into inventory. In “My Orders” screen, user can click on the option button present in left side for each list item, then user can click on the fulfill button present at the top breadcrumb.

In Android, user don’t need to click on the fulfill button, it will ask for confirmation whether the user wants to add this order into inventory or not. By choosing ‘yes’, it will open up “Add Inventory” screen by populating the order detail. On that screen, user has the facility to change the Quantity, Unit Purchase Price & Unit Sale price. Then user can click on “Add” button. The inventory record will be created then and order will be listed in the Closed Order List.

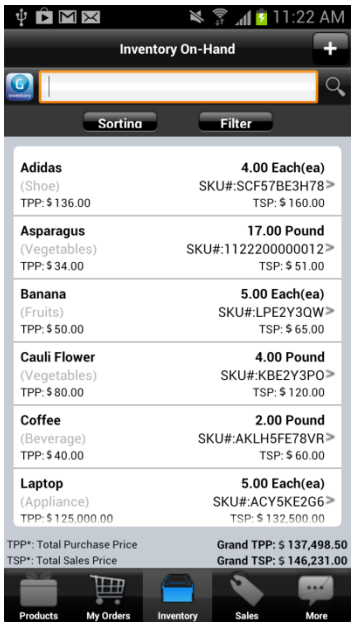
Closed Purchase Order

User can view fulfilled purchase order list in “More > Closed Orders” menu. There user can search, filter and sort these list and email it to personal email account.

Email Order List

Using this feature, user can send an email containing the order list present in the My Orders screen. To send the email, user needs to click on the “Mail” button present at the top left hand corner of “My Orders” screen.

Inventory



In this section, user has the facility to view and manage inventory items. “Inventory” tab open up the “Inventory – On Hand” screen by product i.e. this screen displays product list which having the inventory entry and their current total stock information. By selecting each product, user can view the detail inventory entry list in “In” tab, sales list in “Out” tab and detail available entries in “On Hand” tab, against that product.

In “Inventory – On Hand” user can filter the item by zero stock item, non-zero stock item, category etc.

Here, search only works on “Product Name & SKU#”.

After fulfilling a Purchase Order an inventory item is created. User can also add inventory items from this screen to product list without creating/fulfilling any Order.

Following features are present in the inventory section:

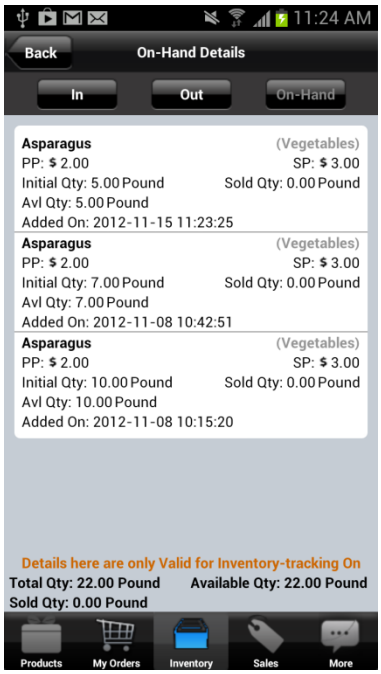
- Adding inventory items
- Inventory - In Tab
- Inventory - Out Tab
- Inventory - On Hand Tab

Adding Inventory Items

User can add inventory by touching + button which is at the top right corner of the inventory screen. On touching + button, a product list screen will open and from that screen user can select product. Upon selecting any product, add inventory screen will open up where user can enter the product name, unit purchase price, unit sale price and quantity.

Inventory-In

This list contains all the inventory entries against each product like quantities, purchase price, sales price which were added from purchase orders or from product list.



Inventory-Out

This list contains the list of sold items against the selected product.

Inventory-In Hand

This list contains the available inventory entries for the selected product which can be available for sale.

Email Inventory List

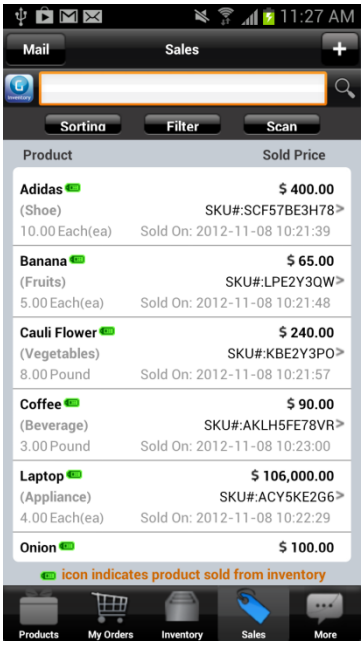
All the inventory listings can be emailed just like the Purchase Order section. To email a list, user needs to click the Mail button present at the top left hand corner of the screen.

Inventory Listing

There is another list present in “More > Inventory Listing”. This list shows the list of all the product items added into the inventory and their current available quantity. On that screen, user can also add inventory items from product list.

Sales Order

User can manage the sales order for the customers in this tab. GOIS standalone doesn’t support customer integration but the application supports sales order creation against product or inventory list, emailing sales order list, search, filter and sorting the sales records.



Adding a Sales Order

A sales order can be added in two ways:

- Using the ‘Scan’ button in Sales screen
- By clicking the + icon present at the top right corner of the screen

Sale Tracking

The concept of “Sales Tracking” On/Off has been described in the Setting Screen section. If “Sale Tracking is on” and user clicks on the + icon to add a new Sales Order then it will display the inventory list from which user has to select the product and to put the quantity for sale. In this case user cannot sale more than the available quantity (Sale Limit) of the item selected. If “Sale Tracking is off” and user clicks on the + icon to add a new Sales Order, then it will display the Product list

from which user has to select the product. In this case, user has no limit (Sale Limit: N/A) for sale.

Adding Sales Order by Scan button

By clicking the scan button, user can scan the barcode of the product. If product SKU # already exists in the product list or inventory list as per Sale Tracking Setting "Off/On", then it will either populate the selected product or display the inventory entries against each product from which user needs to choose the item for sale.

If a product doesn't exist, then it will display options to add the product in the product list/inventory list and then it will be added to the Sales Order.

Adding Sales Order by + button

By clicking on the + icon, either inventory or product list will open up. After choosing the inventory item or product the product information will be populated into 'Sales Entry' screen. User can enter unit purchase price, unit sale price, and quantity for the selected product. The total sales price for the item will be calculated automatically. Once the user clicks on 'Save' button the sales order will be added.

Editing a Sales Order

Select the Sales Order from Sales tab for editing. This will open up the edit sales order screen. When editing sales order, if "Sale tracking" is on then the Sale limit will be auto populated as per the inventory data. In this case Sale Limit = Current Available Quantity + Sold Quantity, user cannot sale more than the Sale Limit in case of Sale Tracking On.

Email Sales Order List

Like orders list and inventory list, the sales order list can also be emailed. To email the sales order list user has to click on the Mail button present at the top left corner of the screen.

Reporting

In GOIS-Standalone, user can generate and view following reports:

- Profit and Loss report
- Closed Orders report
- Inventory Listing report
- All Transactions report

User can view these reports from 'More' tab.

Profit and Loss report

While doing any sale entry, the purchase price and sales price of that item is captured. If tracking is on, then the purchase and sale price are populated from inventory item list. If sale tracking is off, then this price is auto populated from product list. Based on these prices at the time of sale, profit/loss is calculated and displayed in this report. The profit and loss report can be viewed for today, this week, this month, this year and by selecting begin and end date from filter section.

Closed Orders

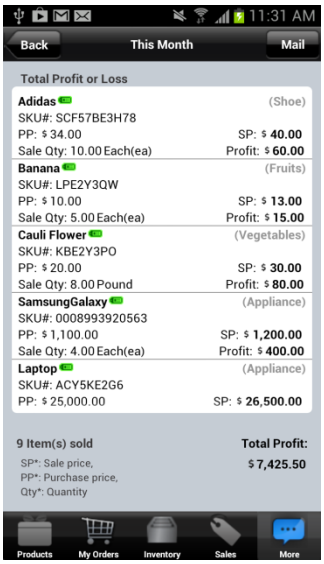
Purchase Orders which are fulfilled and added to inventory are considered as closed order in this app. User can generate this report by applying filter/sorting.

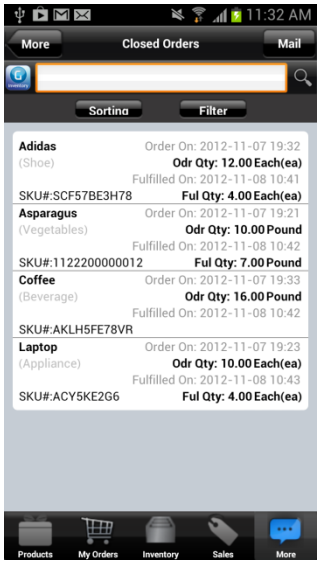
Inventory Listing

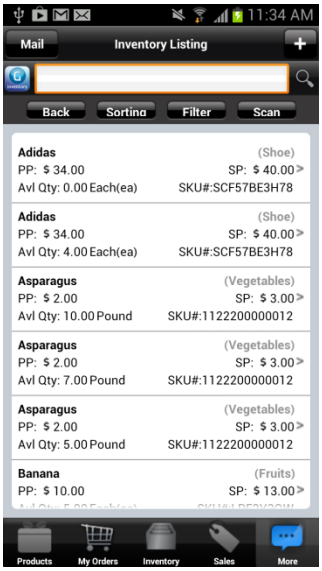
This listing contains all inventory entries against each products present in the inventory.

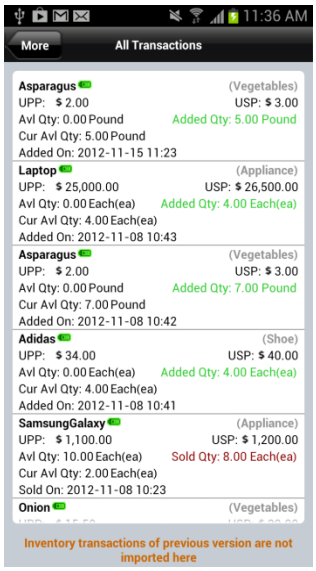
All Transactions

When any item is added /modified into inventory or there is any sale from the inventory or product list then all those actions are listed in this report. Here user can filter and view the historical transaction data.





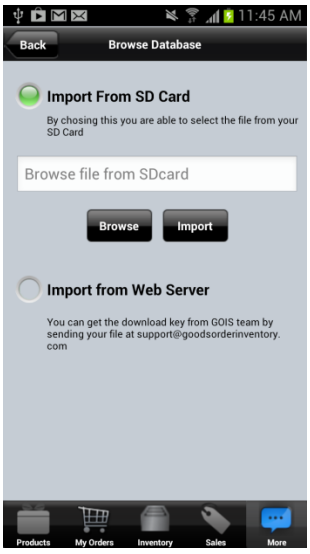



11:36 AM
More
All Transactions
Asparagus (Vegetables)
UPP: $ 2.00 USP: $ 3.00
Avl Qty: 0.00 Pound Added Qty: 5.00 Pound
Cur Avl Qty: 5.00 Pound
Added On: 2012-11-15 11:23
Laptop (Appliance)
UPP: $ 25,000.00 USP: $ 26,500.00
Avl Qty: 0.00 Each(ea) Added Qty: 4.00 Each(ea)
Cur Avl Qty: 4.00 Each(ea)
Added On: 2012-11-08 10:43
Asparagus (Vegetables)
UPP: $ 2.00 USP: $ 3.00
Avl Qty: 0.00 Pound Added Qty: 7.00 Pound
Cur Avl Qty: 7.00 Pound
Added On: 2012-11-08 10:42
Adidas (Shoe)
UPP: $ 34.00 USP: $ 40.00
Avl Qty: 0.00 Each(ea) Added Qty: 4.00 Each(ea)
Cur Avl Qty: 4.00 Each(ea)
Added On: 2012-11-08 10:41
SamsungGalaxy (Appliance)
UPP: $ 1,100.00 USP: $ 1,200.00
Avl Qty: 10.00 Each(ea) Sold Qty: 8.00 Each(ea)
Cur Avl Qty: 2.00 Each(ea)
Sold On: 2012-11-08 10:23
Onion (Vegetables)
Inventory transactions of previous version are not imported here

Import/Export Database

Export Database

If the user wishes to take the backup of GOIS SQLite database, that can be done using the Export Database option. This option is available in the 'More Tab > Export Database' menu. User needs to click on the 'Export GOIS Database' button. This will send an email to the user with the database as an attachment.



Import Database

Import Database is supported in GOIS standalone application from iPhone version 1.7 and Android version 1.1.0 onwards. It provides the flexibility to transfer, exchange and backup the data between two similar types of devices.

Process of Importing Database

In the earlier versions (iPhone version 1.7 and Android version 1.1.0), user was provided with the facility to export GOIS databases. The database (*.db file) was sent to the user by email can now be imported/downloaded for the same or a different device.

For example, if user is using an Android based device then user can import the Android Goods Order Database. In 'More' tab, user will find a link to Import Database. When the link is clicked, user will get the option to Import the database.

The database can be imported in the following ways:

1. **Import using SD Card** (This option is only available for Android devices.)
   To import the database, user needs to select the Goods Order Inventory database from the SD card.

2. **Import from Web Server** (This option is available for both Android and iPhone devices.)
   If user wants to import the database using this option, then the user needs to send an email to us, containing the database as an attachment, at support@goodsorderinventory.com

   Note: Please make sure to send the correct device type like android, iPhone and registered email ID in the email for getting Download Key. If user has not registered the email ID with GOIS-Standalone then it can be updated in 'More > User Profile' section.

Goods Order team will send the user a **Download Database Key** by email. After entering the key, user will get a list of all the database files. Then, on selecting one of the files from the list, the system will ask the user for confirmation. If user proceeds with the 'Yes' option, the current database will get replaced with the newly imported database.

Note: *User should make sure to back up the database before doing any import. Otherwise, user will lose the previous data as the import process will overwrite the existing data.*

Miscellaneous

Email

User can email the reports (Order List, Inventory List, Closed Order List, Profit/Loss Report, & Sales Report) to any of the provided email IDs using filtration and sorting. In Email preview window, user can preview the reports before emailing.

Note: *Some report may contain more columns than it displayed in preview.*

Filter & Sorting

In all listing screen like Products, Orders, Inventory, Sales, All Transactions, Closed Order, Profit/Loss, etc. there is this facility for filtration. User can also sort the filtered data in ascending or descending order.

Referral Request

Any user who is registered with GOIS- Standalone application can suggest friends or colleagues for using this app. For that, there is this option in "More" menu for sending the referral request.

How referral works?

In "Registration" screen, when any user register their information (Email and Name), we track that sign-up information for future communication. We identify referral sign-ups from their email addresses user referred to.

Note: Please make sure that when people referred to sign-up with GOIS, they use their same email address in the referral email. If they will use a different email for sign-up than that was provided, we cannot credit that sign-up towards any user account.

We request that you refer Goods Order application to your friends if you like this. If you decide not to refer this to someone because you don't like the application we would appreciate if you can write us an email with any possible improvements you want to see at: support@goodsorderinventory.com

Help

Click on the "More > Help". This will show the "Help" screen. In this screen user can get the following information related with GOIS-Standalone application:

1. **FAQ:** On clicking "FAQ" link, a FAQ screen will open up and from there user can refer to frequently asked questions and answers.
2. **Quick Help:** On touching "Quick help" link, quick help screen will open up and user can view the quick help related with GOIS-Standalone.
3. **Help (Detailed help with screen shots):** On touching this link, user can view user manual in detail with screen shots.
4. **Release note of latest version:** This section provides the information about the new features list added in specific version.

Support & Feedback

You can contact us through email support@goodsorderinventory.com for any kind of support related assistance or if you want to share your views with GOIS team to improve this product.

In GOIS-Standalone application you have also the facility to send us the feedback from "More > Support/Feedback" menu. Please make sure, you have the updated Email ID in profile section, so that we can communicate with you in case we need any clarification.